

University of Montana

## ScholarWorks at University of Montana

---

Institute for Tourism and Recreation Research  
Publications

Institute for Tourism and Recreation Research

---

3-1-2005

### Helena Residents on Tourism Development: Attitudes and Opinions from Montana's Capital Montana CTAP 2004-2005

Jim Wilton

*The University of Montana-Missoula*

Follow this and additional works at: [https://scholarworks.umt.edu/itrr\\_pubs](https://scholarworks.umt.edu/itrr_pubs)



Part of the [Leisure Studies Commons](#), [Recreation, Parks and Tourism Administration Commons](#), and  
the [Tourism and Travel Commons](#)

## Let us know how access to this document benefits you.

---

#### Recommended Citation

Wilton, Jim, "Helena Residents on Tourism Development: Attitudes and Opinions from Montana's Capital Montana CTAP 2004-2005" (2005). *Institute for Tourism and Recreation Research Publications*. 138.  
[https://scholarworks.umt.edu/itrr\\_pubs/138](https://scholarworks.umt.edu/itrr_pubs/138)

This Report is brought to you for free and open access by the Institute for Tourism and Recreation Research at ScholarWorks at University of Montana. It has been accepted for inclusion in Institute for Tourism and Recreation Research Publications by an authorized administrator of ScholarWorks at University of Montana. For more information, please contact [scholarworks@mso.umt.edu](mailto:scholarworks@mso.umt.edu).

# Helena Residents on Tourism Development: Attitudes and Opinions from Montana's Capital

Helena, Montana



March 2005



College of Forestry & Conservation  
The University of Montana  
32 Campus Drive #1234  
Missoula, MT 59812-1234

Phone (406) 243-5686  
Fax (406) 243-4845  
[www.itrr.umt.edu](http://www.itrr.umt.edu)

---

# Helena Residents on Tourism Development: Attitudes and Opinions from Montana's Capital

As Part of the  
Montana Community Tourism Assessment Program (CTAP) 2004-2005

James Wilton

Research Report 2005-3  
March 2005

This report was funded by Montana's Accommodations Tax.

## **Acknowledgements**

This study could not have been completed without the cooperation of several outstanding people. We would like to thank Mike Mergenthaler and Cathy Burwell for their coordinating efforts regarding committee meetings and all the related correspondence. Secondly, we would like to thank the Helena CTAP Action Committee for all of their input in assisting ITRR in drafting and reviewing the local survey questions. Finally, Megan McBride deserves many thanks for her long hours in managing and preparing the Helena dataset for analysis. All of these efforts were key to making this local survey a success.

## Executive Summary

This report presents information about tourism and recreation in Helena, Lewis and Clark County, and throughout the state. It offers estimated travel volume and traveler characteristics for overnight visitors to Lewis and Clark County, which was extrapolated from the 2001/2002 Nonresident Travel Study dataset, and includes the results of a 2004 Helena resident attitude survey. This survey provides residents' opinions and attitudes regarding tourism and its development in Helena, and compares those results with a 2004 statewide survey.

The Helena resident attitude survey represents responses from a random sample of 178 households in the fall of 2004, and a statewide random sample of 410 Montana households in the same period. The survey sequence was initiated by mailing a pre-survey notice letter to all selected households. A week later, the first round of questionnaires was mailed followed by a reminder/thank-you postcard one week later. Two weeks after mailing the postcards, replacement questionnaires were sent to those households who had not yet responded. The final adjusted response rate was 41 percent for Helena, and 47 percent for the state.

The following bulleted points offer highlights of the 2001/2002 Nonresident Travel Study for Lewis and Clark County and the state, in addition to the 2004 Helena and statewide resident attitude surveys. A more detailed analysis is found in the remainder of the report.

### **Nonresident Visitors (2001/2002 Nonresident Survey Data and 2003 Visitor Estimates):**

- In 2003, over four million nonresident travel groups visited Montana. Of those, about 672,000 groups traveled through Lewis and Clark County, with 594,000 driving through Helena.
- Over \$1.8 billion was spent statewide in 2003 by nonresident travelers with more than \$70 million being spent in Lewis and Clark County. Statewide this amounts to approximately \$2,042 for every Montana resident, and \$1,229 for Lewis and Clark County residents.
- Thirty-nine percent of nonresident overnight visitors in Lewis and Clark County were primarily on vacation, compared to 43 percent at the statewide level. Twenty-nine percent were visiting family or friends.
- Eighty-seven percent of visitors to Lewis and Clark County had visited Montana before their trip, and 28 percent had previously lived in the state.
- Less than half (41%) of Lewis and Clark County visitors traveled as couples, but many also traveled with family (24%) or alone (21%).
- Overnight visitors to Lewis and Clark County were more likely than statewide visitors to stay with friends or relatives, but less likely to stay in campgrounds.
- The largest group (28%) of Lewis and Clark County overnight visitors had an annual income of \$40,000 to \$59,999, while nearly one-third (31%) had incomes over \$80,000.
- More than one-third (35%) of overnight visitors to Lewis and Clark County found information from the Internet to be the most useful information source of the sources listed to plan their trip, and visitor information centers (27%) were the most useful during their trip.
- Vacationers to Lewis and Clark County were attracted to Montana primarily for visiting family and friends (21%) and the mountains (16%).
- Lewis and Clark County visitors' largest expenditures were restaurants (23%), followed by retail sales (22%) and overnight accommodations (15%).

## **Resident Characteristics and Attitudes about Tourism (2004 Resident Attitude Survey):**

- Respondents from Helena have resided in their community for 25 years and in the state for 39 years compared to the statewide respondents who have lived in their community for 24 and in the state for 33 years.
- Montana natives comprise 54 percent of the Helena sample.
- The largest portion (24%) of Helena residents earns their household income from professional occupations.
- The majority (83%) of Helena respondents feel the tourism industry should have a role at least equal to other industries in the local economy, and ranked the industry third on a list of eight desired economic development options.
- Nearly three-quarters (74%) of Helena residents work in places that they perceive to supply little or none of their products or services to tourists or tourist businesses.
- While 71 percent of Helena respondents have infrequent contact with tourists, almost two-thirds (64%) enjoy meeting and interacting with tourists.
- Helena residents show slightly stronger attachment to their community than the statewide respondents.
- Nearly all (97%) Helena respondents feel that the population in the area is increasing, and of those, 67 percent feel it is increasing at about the right rate.
- Helena residents feel that tourism can enhance their quality of life by improving museums and cultural centers, job opportunities and the education system.
- The respondents of Helena are somewhat more supportive of tourism development than statewide residents.
- Residents of Helena strongly agree that decisions about tourism development should involve residents of the community, as do statewide respondents.
- Economic growth is perceived as the primary advantage of increased tourism in Helena, while traffic congestion is the leading disadvantage.
- Outdoor recreation is what Helena residents feel has the greatest potential for attracting visitors.
- Residents believe that quality visitor information services are available in Helena, although some respondents wanted these services to be more centrally located.
- Nearly all (95%) respondents feel that tourism is good for Helena, primarily because of the economic implications.

## Table of Contents

EXECUTIVE SUMMARY.....	1
INTRODUCTION .....	5
SECTION 1: THE 2001/2002 NONRESIDENT TRAVEL STUDY.....	6
METHODOLOGY.....	6
A PROFILE OF RECENT MONTANA VISITORS.....	6
Group Characteristics .....	6
Information Sources .....	8
Montana Attractions and Activities.....	8
Economic Characteristics.....	10
SECTION 2: THE RESIDENT ATTITUDE STUDY.....	11
METHODOLOGY.....	11
HELENA RESIDENT ATTITUDES.....	12
Respondent Characteristics .....	12
Tourism and the Local Economy .....	14
Interactions with Tourists in the Community .....	15
Community Attachment and Change.....	15
Quality of Life - Current Conditions and Tourism's Influence.....	16
PERCEIVED CONNECTIONS BETWEEN TOURISM AND COMMUNITY LIFE .....	18
Tourism Support.....	18
Tourism Concerns .....	19
Advantages and Disadvantages of Tourism Development.....	21
QUESTIONS SPECIFIC TO HELENA.....	23
CONCLUSION.....	30
APPENDIX A: HELENA SURVEY INSTRUMENT.....	32
APPENDIX B: RESPONDENT COMMENTS .....	40

## List of Tables

TABLE 1: SAMPLE SIZES AND RESPONSE RATE.....	6
TABLE 2: REASONS FOR TRAVELING TO MONTANA.....	7
TABLE 3: CHARACTERISTICS OF NONRESIDENT VISITORS.....	7
TABLE 4: TRAVEL INFORMATION SOURCES.....	8
TABLE 5: ATTRACTIONS OF MONTANA AS A VACATION DESTINATION.....	9
TABLE 6: RECREATION ACTIVITY PARTICIPATION.....	9
TABLE 7: EXPENDITURES OF NONRESIDENT TRAVELERS.....	10
TABLE 8: 2004 HELENA AND STATEWIDE SURVEY SAMPLES.....	11
TABLE 9: RESPONDENT CHARACTERISTICS.....	13
TABLE 10: ROLE OF AND DEPENDENCY ON TOURISM.....	14
TABLE 11: DESIRABILITY OF ECONOMIC DEVELOPMENT ALTERNATIVES.....	14
TABLE 12: INTERACTION WITH TOURISTS.....	15
TABLE 13: INDEX OF COMMUNITY ATTACHMENT.....	16
TABLE 14: PERCEPTIONS OF POPULATION CHANGE.....	16
TABLE 15: QUALITY OF LIFE—CURRENT CONDITION.....	17
TABLE 16: QUALITY OF LIFE—TOURISM’S INFLUENCE.....	18
TABLE 17: INDEX OF TOURISM SUPPORT.....	19
TABLE 18: INDEX OF TOURISM CONCERN.....	20
TABLE 19: LAND USE CONCERN.....	20
TABLE 20: TOURISM-RELATED DECISION-MAKING.....	21
TABLE 21: ADVANTAGES ASSOCIATED WITH INCREASED TOURISM.....	22
TABLE 22: DISADVANTAGES ASSOCIATED WITH INCREASED TOURISM.....	22
TABLE 23: LOCAL ATTRACTIONS FOR VISITING GUESTS.....	23
TABLE 24: ATTRACTIONS WITH GREATEST POTENTIAL FOR VISITORS.....	23
TABLE 25: OUTDOOR RECREATION ATTRACTIONS.....	24
TABLE 26: SPORTING EVENTS ATTRACTIONS.....	24
TABLE 27: HISTORICAL AND HERITAGE ATTRACTIONS.....	24
TABLE 28: ARTS AND CULTURE ATTRACTIONS.....	25
TABLE 29: MUSEUMS AND CULTURAL CENTERS ATTRACTIONS.....	25
TABLE 30: NATURAL AREAS ATTRACTIONS.....	25
TABLE 31: CONFERENCES AND MEETINGS ATTRACTIONS.....	26
TABLE 32: SPECIAL EVENTS ATTRACTIONS.....	26
TABLE 33: RETAIL SHOPPING ATTRACTIONS.....	26
TABLE 34: OTHER ATTRACTIONS.....	26
TABLE 35: HELENA BUSINESS INTERACTION WITH VISITORS.....	27
TABLE 36: HELENA RESIDENT INTERACTION WITH VISITORS.....	27
TABLE 37: HELENA VISITOR INFORMATION SERVICES.....	28
TABLE 38: TOURISM IN HELENA.....	28
TABLE 39: HELENA ACTIVITIES NOT TO BE PROMOTED.....	29
TABLE 40: POSITIVE IMPRESSIONS OF HELENA.....	29
TABLE 41: NEGATIVE IMPRESSIONS OF HELENA.....	29



## Introduction

This report is intended to provide an analysis of Helena and statewide resident attitudes toward tourism development, as well as a profile of recent visitors to the Lewis and Clark County. It combines the results of three different studies and is presented in two sections. The first section contains local nonresident visitor profiles, as well as profiles for statewide visitors. The visitor profiles were developed using research conducted by ITRR throughout 2001 and in the fall of 2002. Data from nonresident travelers spending at least one night in the Lewis and Clark County were used for the profile information.

The second section of this report contains an assessment of resident attitudes toward tourism in Helena. This assessment is the result of a survey obtained from households throughout the city in the fall 2004. It is provided side by side with the same inquiries collected at the state level in 2004 to provide a comparison between resident opinions toward tourism in Helena and in Montana as a whole.

Information for this report was gathered as part of the Community Tourism Assessment Program (CTAP), which is a nine month economic development program conducted in three Montana communities each year. Helena was selected for the 2004/2005 CTAP, together with the Rocky Boy Reservation and Wheatland County. The CTAP program is facilitated by Travel Montana (Montana Department of Commerce) and the Montana State University Extension Service.

Funding for this research comes from Montana's Accommodations Tax. Copies of this report can be downloaded from ITRR's web site ([www.itrr.umt.edu](http://www.itrr.umt.edu)) at no charge.

## Section 1: The 2001/2002 Nonresident Travel Study

### Methodology

Travelers to Montana during the 2001 travel year (December 1, 2000 - November 30, 2001) and the fall of 2002 (October 1 – November 30, 2002) were intercepted for the 2001/2002 Nonresident Travel Study. The traveler population was defined as those travelers entering Montana by private vehicle or commercial air carrier during the study period, and whose primary residence was not in Montana at the time. Specifically excluded from the study were those persons traveling in a plainly marked commercial or government vehicle such as a scheduled or chartered bus, or commercial vehicles. Also excluded were those travelers who entered Montana by train. Other than these exceptions, the study attempted to assess all types of travelers to the state.

Data were obtained through a mail-back diary questionnaire administered to a sample of intercepted travelers in the state. During the fourteen-month study period, 11,996 questionnaires were delivered to visitor groups (Table 1). Usable questionnaires were returned by 4,595 groups, resulting in a response rate of 38 percent. A sub-sample of 770 respondent groups traveled through the Lewis and Clark County, with 160 of them spending at least one night in the area.

**Table 1: Sample Sizes and Response Rate**

<b>2001/2002 Nonresident Travel Study</b>	
Questionnaires delivered	11,996
Questionnaires returned	4,595
Nonresident Travel Study response rate	38%
Nonresidents who drove through Lewis and Clark County	770
Nonresidents who drove through Helena	653
Lewis and Clark overnights (spent at least 1 night)	160

### A Profile of Recent Montana Visitors

This section presents a profile of Montana visitors from the 2001/2002 nonresident survey. Group characteristics are reviewed for both statewide visitors as well as overnight travelers to Lewis and Clark County. Overnight visitors are important for analysts and marketers due to their more inclusive spending patterns compared to day trippers. In addition, a brief economic profile highlights the spending contributions nonresidents make to Lewis and Clark County and throughout Montana.

### Group Characteristics

Travel group characteristics for the Lewis and Clark County were obtained from visitors who spent at least one night in the area. Tables 2 and 3 show several differences between the travel groups staying overnight in this travel area and throughout Montana.

**Table 2 : Reasons for Traveling to Montana**

	Lewis and Clark Co.		Statewide	
	All Reasons*	Primary Reason**	All Reasons*	Primary Reason**
Vacation	67%	39%	62%	43%
Visit family or friends	43%	29%	29%	16%
Business	17%	13%	11%	9%
Passing through	16%	9%	34%	26%
Shopping	6%	1%	8%	2%
Other	13%	9%	7%	5%

Source: ITRR 2001/2002 Nonresident Travel Study. Lewis and Clark County overnight visitors n=160; statewide all visitors n=4595.

\*Visitors could indicate more than one reason. \*\*Percentages may not add to 100 due to rounding.

**Table 3 : Characteristics of Nonresident Visitors**

	Lewis and Clark Co.	Statewide
Group Type		
Friends	5%	6%
Couple	41%	40%
Alone	21%	18%
Family	24%	28%
Family & friends	6%	4%
Business associates	2%	2%
Organized group	1%	1%
Have previously visited Montana	87%	80%
Have previously lived in Montana	28%	17%
Nights spent in Montana	5.8	4.4
Accommodations used in Montana		
Hotel, motel, B&B	47%	47%
Private campground	13%	14%
Home of friend or relative	25%	17%
Public campground	7%	10%
Private cabin/2 <sup>nd</sup> home	2%	4%
Rented cabin/home	3%	2%
Other	4%	6%
Income		
Less than \$20,000	4%	7%
\$20,000 to \$39,999	18%	17%
\$40,000 to \$59,999	28%	25%
\$60,000 to \$79,999	19%	20%
\$80,000 to \$99,999	12%	11%
Over \$100,000	19%	20%
Place of Primary Residence	WA (15%) ALB (13%) CA (7%) CO (6%) OR (6%)	WA (13%) CA (7%) ALB, MN (6%) ID, ND, WY (5%) CO, OR (4%)

Source: ITRR 2001/2002 Nonresident Travel Study. Lewis and Clark County overnight visitors n=160; statewide all visitors n=4595. Percentages may not add to 100 due to rounding.

Compared to the statewide sample, overnight visitors to Lewis and Clark County are visiting family or friends more, but passing through the state at a much smaller margin. Other visitor characteristics show several similarities; group types, repeat visitor rates, accommodations, and household income followed similar distributions for the two samples.

## Information Sources

Nonresident travel groups indicated which information sources were used as planning tools for their trip *prior* to arriving in Montana, as well as while they were *visiting* Montana. Also, respondents indicated which of the sources were most useful to them. A list of nine pre-trip and five Montana information sources was included in the questionnaire (Table 4).

**Table 4: Travel Information Sources**

Information Sources Used <u>Prior to Visiting</u> Montana	Lewis and Clark Co.		Statewide	
	All Sources*	Most Useful Source**	All Sources*	Most Useful Source**
The Internet	40%	35%	37%	39%
Information from private businesses	12%	10%	9%	9%
Auto club	30%	27%	23%	24%
National Park brochure	9%	3%	14%	7%
Montana Travel Planner	13%	7%	8%	5%
Chamber or visitor bureau	7%	3%	8%	4%
Travel guide book	14%	11%	10%	8%
Travel agency	4%	4%	4%	3%
1-800 State travel number	2%	1%	1%	1%
None of the sources	43%	n/a	41%	n/a
<b>Information Sources Used <u>While Visiting</u> Montana</b>				
Highway information signs	28%	22%	32%	26%
Brochure racks	27%	22%	24%	16%
Service person (motel, restaurant, gas station, etc.)	33%	23%	29%	25%
Visitor information center	27%	27%	22%	23%
Billboards	10%	7%	12%	5%
None of these sources	37%	n/a	39%	n/a

Source: ITRR 2001/2002 Nonresident Travel Study. Lewis and Clark County overnight visitors n=160; statewide all visitors n=4595.

\*Visitors could indicate more than one information source. \*\*Percentages may not add to 100 due to rounding.

Regarding information sources used prior to visiting Montana, both samples were very similar with over one-third finding the Internet as the most useful, followed by about one-quarter selecting auto clubs as most useful planning information. Furthermore, both groups had comparable percentages for information sources used while in Montana; with the exception of brochure racks that were used at higher rates for the Lewis and Clark County group.

## Montana Attractions and Activities

Respondents who indicated that one purpose for their trip was vacation were asked what attracted them to Montana as a vacation destination. They were asked to check all pertinent attractions, and then indicate one *primary* attraction (Table 5). In addition they were asked about various recreation activities in which they participated (Table 6).

**Table 5: Attractions of Montana as a Vacation Destination**

	Lewis and Clark Co.		Statewide	
	Attractions*	Primary Attraction**	Attractions*	Primary Attraction**
Mountains	40%	16%	35%	10%
Rivers/lakes	34%	3%	24%	1%
Open space	29%	7%	29%	11%
Glacier National Park	27%	15%	21%	16%
Visiting family and friends	25%	21%	17%	13%
Yellowstone National Park	22%	6%	31%	20%
Wildlife	20%	--	20%	1%
Fishing	17%	10%	11%	4%
Camping	15%	2%	14%	2%
Hiking	14%	3%	13%	<1%
Lewis and Clark	12%	3%	7%	1%
Other Montana history	11%	5%	8%	3%
Native American culture	7%	1%	6%	1%
Special events	7%	2%	5%	4%
Northern Great Plains	6%	--	6%	<1%
Hunting	3%	6%	3%	5%
Other	10%	2%	7%	7%

Source: ITRR 2001/2002 Nonresident Travel Study. Lewis and Clark County overnight visitors n=160; statewide all visitors n=4595.

\*Visitors could indicate more than one attraction. \*\*Percentages may not add to 100 due to rounding.

**Table 6 : Recreation Activity Participation**

	Lewis and Clark Co.*	Statewide*
Shopping	45%	37%
Day hiking	34%	26%
Visiting museums	28%	16%
Visiting other historic sites	26%	23%
Wildlife watching	26%	29%
Picnicking	23%	22%
Camping (developed area)	19%	19%
Fishing	19%	13%
Visiting Lewis and Clark sites	19%	13%
Visiting Native American sites	15%	12%
Nature studies	11%	9%
Camping (primitive areas)	10%	8%
Special event/festivals	10%	9%
Gambling	9%	8%
Golfing	9%	5%
Motor boating, water skiing	8%	4%
Canoeing/kayaking	7%	3%
Road/mountain biking	6%	5%
River floating/rafting	4%	5%
Backpacking	3%	3%
Sporting event	3%	3%
Off-road/ATV	1%	2%
Sailing/windsurfing	1%	<1%

Source: ITRR 2001/2002 Nonresident Travel Study. Lewis and Clark County overnight visitors n=160; statewide all visitors n=4595.

\*Visitors could indicate more than one activity.

Looking at the attractions of Montana, Lewis and Clark County respondents preferred visiting family and friends, mountains, and fishing more than the statewide group. On the other hand, statewide respondents were more attracted to Yellowstone National Park and open space than the Lewis and Clark County group. With the exception of just six recreation activities (out of 23), the Lewis and Clark County sample participated in all other recreation activities to higher degrees than the statewide group.

## Economic Characteristics

Information about the number of visitors to an area and how much they spend during their visit is useful for planning purposes. While the preceding travel group characteristics are based only on groups who spent at least one night in the Lewis and Clark or the state, economic information represents all nonresident groups who spent money in the county or state whether they stayed a night or not (Table 7).

**Table 7 : Expenditures of Nonresident Travelers**

Distribution of Expenditures	Lewis and Clark Co.	Statewide
Restaurant, bar	23%	21%
Retail sales	22%	21%
Lodging, campgrounds, etc.	15%	13%
Guides, outfitters*	13%	4%
Gas, oil	12%	22%
Auto rental and repair, transportation	6%	7%
Groceries, snacks	6%	7%
Misc. expenses, licenses, fees	4%	4%
Total expenditures in sample area, 2003	\$70,148,000	\$1,874,000,000
Total travel groups through sample area, 2003	672,000	4,177,000
Total travel groups through Helena only, 2003	594,000	
Travel group size (persons)	2.2	2.3
Population (2003)	57,100	917,621
Per capita expenditures in sample area	\$1,229	\$2,042

Source: ITRR 2001/2002 Nonresident Travel Study; U.S. Census Bureau, 2005<sup>1</sup>. Lewis and Clark all visitors n=695; statewide all visitors n=4595. Economic information updated 01/22/05; percentages may not add to 100 due to rounding. \*Use with caution; figure may be overestimated due to weighting and sample size.

Differences in expenditure distribution show that the Lewis and Clark County visitors spend a smaller portion of their money on gasoline than statewide visitors, but more on guides and outfitters. Lower gasoline expenditures could be due to travelers having filled up their tanks in relatively nearby cities (Butte, Great Falls, Missoula, Bozeman) before they visited centrally-located Lewis and Clark County; and then leaving the county with enough fuel for their next destination. As for the higher guides and outfitters expenditures, this could be an overestimate due to small sample size and/or data weighting—these numbers should be used with caution. Finally, per capita expenditures for the Lewis and Clark County sample are about 60 percent the amount of the statewide figure. This could be due, in part, to the nearly one-third of overnight travelers to Lewis and Clark County visiting family and friends, which would likely reduce their overall travel spending compared to vacation travel.

<sup>1</sup>U.S. Census Bureau, 2005. Montana County Population Estimates: April 1, 2000 to July 1, 2002. <http://quickfacts.census.gov/qfd/states/30/30049.html>. Accessed January 7, 2005.

## Section 2: The Resident Attitude Study

### Methodology

In an effort to help understand how residents feel about tourism and its impacts, a resident attitude survey was conducted. In the fall of 2004, a booklet-style questionnaire was administered to a sample of Helena residents. A similar survey (although lacking Helena-specific questioning) was also distributed to a statewide random sample during the same period and those results are reported here as well.

The survey administration sequence was initiated by mailing a pre-survey notification letter to a random sample of 500 Helena households<sup>2</sup>, and 1,000 Montana residents. The letter informed recipients of the survey and alerted them to the appearance of a questionnaire in their mailbox in the near future. A week later, a questionnaire was mailed to the same households, along with a cover letter from the local CTAP working group and a cover letter from ITRR stating in more detail the purpose and nature of the study.

One week following the questionnaire mailing, a postcard was sent to all selected households. This served the dual purpose of thanking respondents for their efforts if they had already returned their questionnaire, and reminding those who had set it aside to complete it and return it in the postage-paid return envelope. After two more weeks, replacement questionnaires were sent to those households that had not yet responded to the first questionnaire mailing. Included this time was a different cover letter addressing some concerns respondents may have had that kept them from responding. The cut-off day for accepting returned questionnaires was four weeks following the last mailing. The survey instrument is included in Appendix A.

A non-response bias check was not conducted at the conclusion of the sampling effort. Such bias checks often take the form of a telephone interview to determine if those in the sample who did not respond to the questionnaire differ on key issues from those who did respond. In this case, the key questions where opinions may have differed involve statements of support for tourism development. These key questions could only be answered after considering other questions asked in the survey. It was therefore not possible to develop a condensed telephone non-response questionnaire.

The reader is cautioned to bear in mind that the results presented are the opinions of only 41 percent (178 households) of Helena residents polled (Table 8). It is assumed that respondents did not differ from non-respondents in their opinions.

Because the age distribution of the survey respondents differed from the Montana census estimates of age groups<sup>3</sup>, responses were weighted to more closely reflect the population of Helena. The results presented in this report reflect the adjusted dataset, with the exception of demographic and open-ended questions.

**Table 8 : 2004 Helena and Statewide Survey Samples**

	Helena	Statewide
Resident questionnaires mailed	500	1000
Undeliverable questionnaires	67	125
Completed questionnaires	178	410
Response rate	41%	47%

<sup>2</sup>The sample of addresses was purchased from Survey Sampling, Inc: Fairfield, CT.

<sup>3</sup>U.S. Census Bureau, 2004. DP-1. Profile of General Demographic Characteristics: 2000.

[http://factfinder.census.gov/servlet/QTTable?\\_bm=n&\\_lang=en&\\_or\\_name=DEC\\_2000\\_SF1\\_U\\_DP1&ds\\_name=DEC\\_2000\\_SF1\\_U&\\_eo\\_id=04000US30](http://factfinder.census.gov/servlet/QTTable?_bm=n&_lang=en&_or_name=DEC_2000_SF1_U_DP1&ds_name=DEC_2000_SF1_U&_eo_id=04000US30) Accessed December 13, 2004.

## **Helena Resident Attitudes**

When a community pursues tourism as a development strategy, the goals of that effort can often include an improved economy, more jobs for local residents, community stability, and ultimately, a stable or improved quality of life for the community's residents. On the other hand, negative impacts can also result from tourism development strategies that are not carefully considered. Understanding residents' perceptions of the conditions of their surroundings and tourism's influence on those conditions can provide guidance toward appropriate development decisions.

Residents of an area may hold a variety of opinions about tourism and other forms of economic development. They may have both positive and negative perceptions of the specific effects of tourism. Attitudes and opinions are good measures for determining the level of support for community and industry decisions. The resident attitude questionnaire addressed topics that provide a picture of perceived current conditions and tourism's potential role in the community.

## **Respondent Characteristics**

In this section, several respondent demographic details are reported for Helena residents and the statewide respondents. In Table 9, respondents indicated their age, gender, residency and employment status .



**Table 9 : Respondent Characteristics**

	<b>Helena</b>	<b>Statewide</b>
<b>Age and Gender Characteristics</b>		
Average age	56 years	48 years
Minimum age	22 years	23 years
Maximum age	94 years	96 years
Percent male	60%	55%
Percent female	40%	45%
<b>Residency Characteristics</b>		
Born in Montana	54%	52%
Mean years lived in Montana	39 years	33 years
Mean years lived in community	25 years	24 years
Rural, out-of-town community	n/a	34%
Urban, in-town community	n/a	66%
<b>Community Residency</b>		
10 years or less	24%	32%
11 to 20 years	25%	15%
21 to 30 years	17%	18%
31 to 40 years	16%	16%
41 to 50 years	9%	10%
51 years or more	9%	9%
<b>Employment Status</b>		
Employed	63%	68%
Retired	33%	20%
Homemaker	2%	7%
Unemployed	2%	6%
Mean household employment (persons)	1.5	1.5
<b>Source of Household Income*</b>		
Professional	24%	30%
Health care	14%	23%
Education	11%	16%
Retail/wholesale trade	7%	15%
Services	7%	16%
Transportation, communication or utilities	6%	8%
Clerical	5%	7%
Construction	5%	12%
Finance, Insurance or Real Estate	5%	6%
Armed Services	4%	3%
Restaurant or bar	4%	8%
Forestry or forest products	3%	4%
Agriculture	2%	12%
Manufacturing	1%	8%
Travel industry	1%	3%
Other**	14%	21%

\*Respondents could check more than one household income source. \*\*Twenty-five Helena residents selected the "other" category; the most common response was various private sector occupations (9), followed by government (7), retired and professional occupations (3 each), and volunteer and nonprofit (2). Helena n=178, state n=410.

## Tourism and the Local Economy

The local economy and the role tourism and the travel industry should have in it were key issues addressed in the survey. Residents were asked how important a role they felt tourism should have in their community's economy, and whether their employment was dependent on tourism (Table 10). In addition, they ranked industries on a scale from 1 (most desired) to 8 (least desired) indicating which they felt would be most desirable for their community (Table 11).

**Table 10: Role of and Dependency on Tourism**

	Helena	Statewide
Role of Tourism in the Local Economy		
No role	1%	3%
A minor role	17%	23%
A role equal to other industries	69%	58%
A dominant role	14%	16%
Employment's Dependency on Tourists for Business		
My place of work provides <u>the majority</u> of its products or services to tourists or tourist businesses.	4%	6%
My place of work provides <u>part</u> of its products or services to tourists or tourist businesses.	28%	30%
My place of work provides <u>none</u> of its products or services to tourists or tourist businesses.	46%	36%
I currently do not have a job	22%	28%

Percentages may not add to 100 due to rounding. Helena n=178, state n=410.

**Table 11: Desirability of Economic Development Alternatives**

	Helena		Statewide	
	Rank	Mean*	Rank	Mean*
Technology	1	2.69	2	3.30
Services	2	2.70	1	3.12
Tourism and recreation	3	4.08	6	4.44
Retail/wholesale trade	4	4.23	5	4.34
Agriculture	5	4.35	3	3.73
Manufacturing	6	4.59	4	4.28
Wood products	7	6.01	7	5.86
Mining	8	6.88	8	6.72

\* Scores represent the mean of responses measured on a scale from 1 (most desired) to 8 (least desired). Helena n=178, state n=410.

Taking both of these tables together sheds light on both differences and similarities between the two respondent groups. For instance, the Helena sample indicated a larger role for tourism in the economy than the statewide group, although both samples showed strong majorities favoring a considerable role for tourism. Likewise, a larger percentage of Helena residents than statewide respondents reported their place of work not being dependent on tourists for their business. Looking at economic development options, both groups favored technology and services in terms of economic desirability. However, the respondent groups diverged somewhat on the desirability of four economic development alternatives; Helena residents were more positive toward tourism and trade, while less desiring of agriculture and manufacturing than the statewide residents. Both groups ranked wood products and mining similarly with fairly comparable mean scores.

## Interactions with Tourists in the Community

The extent of interaction between tourists and residents can affect the attitudes and opinions residents hold toward tourism in general. In turn, an individual's behavior may be a reflection of those same attitudes and opinions. Respondents were asked questions to determine the extent to which they interact with tourists on a day-to-day basis as well as how they enjoy those interactions (Table 12).

**Table 12: Interaction with Tourists**

	Helena	Statewide
Frequency of Contact with Tourists Visiting Community		
Frequent contact	8%	10%
Somewhat frequent contact	22%	23%
Somewhat infrequent contact	35%	36%
Infrequent contact	36%	31%
Attitude Toward Tourists Visiting Community		
Enjoy meeting and interacting with tourists	64%	63%
Indifferent about meeting and interacting with tourists	32%	34%
Do not enjoy meeting and interacting with tourists	4%	4%

Percentages may not add to 100 due to rounding. Helena n=178, state n=410.

The Helena group reported a very similar distribution of visitor contact responses to the statewide sample, with both groups showing majorities having some degree of infrequent contact with tourists. However, nearly two-thirds of both groups expressed that they enjoy interaction with visiting tourists. So even though both groups generally have infrequent contact with tourists, they tend to enjoy their interaction with them when it does occur.

## Community Attachment and Change

One measure of community attachment may be the length of time and portion of life spent in a community or area. These statistics were reported earlier in the report (Table 9). Other measures may be based on opinions that residents have about their community and perceived changes in population levels.

To help assess community attachment, respondents were asked to indicate their level of agreement with each of three statements on a scale from -2 (strongly disagree) to +2 (strongly agree). A mean response greater than 0 indicates aggregate agreement with the statement in question, and responses with a negative score means some degree of disagreement (Table 13). The larger the absolute size of the mean the stronger the level of agreement or disagreement.

**Table 13: Index of Community Attachment**

	Helena					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I think the future of my community looks bright.	2%	10%	74%	15%	<b>.91</b>	3%	28%	59%	10%	<b>.45</b>
If I had to move away from my community, I would be very sorry to leave.	3%	16%	56%	25%	<b>.84</b>	1%	22%	49%	28%	<b>.82</b>
I'd rather live in my community than anywhere else.	4%	27%	47%	20%	<b>.53</b>	2%	21%	51%	27%	<b>.79</b>
<b>Index of Community Attachment**</b>	<b>.76</b>					<b>.69</b>				

Percentages may not add to 100 due to rounding. Helena n=178, state n=410.

\*Scores represent mean responses measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

\*\*Index scores are the mean average of the mean scores for the three community attachment statements.

**Table 14: Perceptions of Population Change**

	Helena	Statewide
Population is not changing	3%	10%
Population is increasing	97%	76%
Population is decreasing	--	14%
<i>If you feel the population in your community is changing, how would you describe the rate of change?</i>		
Too fast	31%	50%
About right	67%	44%
Too slow	2%	6%

Helena n=178, state n=410.

Overall community attachment for Helena and statewide residents scored positive, suggesting that both respondent groups feel attached to their local community to some degree. Yet there was stronger agreement among the Helena residents for two of the three variables which resulted in a slightly higher overall community attachment index score.

Nearly all of the Helena respondents believed that Helena's population is increasing compared to three-quarters of the statewide group who felt the same way. Yet, about two-thirds of the Helena residents believe the rate of population change is occurring at the right rate, while half of the statewide respondents feel their community's rate of change is too fast. According to the U.S. Census, the population of the Helena increased 2.8 percent from 1990 to 2000<sup>4</sup>, while the statewide population increased by 12.9 percent during the same period.

## Quality of Life - Current Conditions and Tourism's Influence

The concept of "Quality of Life" can be broken down into several independent aspects, such as the availability and quality of public services, infrastructure condition, stress factors such as crime and unemployment, and overall livability issues such as cleanliness. When evaluating the potential for community tourism development, it is often desirable to get an understanding of residents' opinions of the current quality of life in their community. This approach helps identify existing problem areas within the

<sup>4</sup>U.S. Census Bureau, 2005. Montana Quick Facts. <http://quickfacts.census.gov/qfd/states/30/3035600.html>. Accessed 02/16/05.

community, in turn providing guidance to planners and decision-makers. It is also informative to understand how increased tourism might change residents' perceptions of these current quality of life conditions. Such perceptions often define residents' attitudes toward this type of community development.

To address this, respondents were asked to rate the current condition of a number of factors that comprise their current level of quality of life using a scale ranging from -2 (very poor condition) to +2 (very good condition). They were then asked to rate how they believed increased tourism would influence these factors. The influence of tourism was rated using a scale of -1 (negative influence), 0 (both positive and negative influence), and +1 (positive influence) (Tables 15 and 16).

**Table 15: Quality of Life—Current Condition**

	Helena					Statewide				
	Very Poor Condition	Poor Condition	Good Condition	Very Good Condition	Mean Score*	Very Poor Condition	Poor Condition	Good Condition	Very Good Condition	Mean Score*
Emergency services	—	4%	50%	46%	<b>1.37</b>	0%	6%	64%	30%	<b>1.17</b>
Overall community livability	2%	2%	53%	44%	<b>1.35</b>	2%	6%	61%	32%	<b>1.14</b>
Parks and recreation areas	2%	5%	50%	44%	<b>1.31</b>	3%	8%	52%	37%	<b>1.14</b>
Safety from crime	1%	5%	65%	28%	<b>1.14</b>	2%	10%	61%	27%	<b>1.01</b>
Museums and cultural centers	2%	12%	49%	37%	<b>1.09</b>	7%	15%	57%	21%	<b>.71</b>
Education system	2%	10%	57%	31%	<b>1.05</b>	2%	21%	56%	22%	<b>.74</b>
Overall cleanliness and appearance	1%	13%	54%	32%	<b>1.03</b>	2%	15%	58%	25%	<b>.90</b>
Infrastructure	1%	13%	74%	12%	<b>.83</b>	4%	14%	70%	12%	<b>.72</b>
Condition of roads and highways	5%	27%	60%	8%	<b>.40</b>	9%	31%	52%	8%	<b>.18</b>
Cost of living	9%	34%	48%	10%	<b>.15</b>	16%	37%	39%	8%	<b>-.13</b>
Traffic congestion	15%	36%	42%	7%	<b>-.12</b>	19%	31%	37%	13%	<b>-.05</b>
Job opportunities	13%	49%	33%	5%	<b>-.31</b>	24%	43%	28%	5%	<b>-.53</b>
<b>Overall Mean**</b>	<b>.77</b>					<b>.58</b>				

Percentages may not add to 100 due to rounding. Helena n=178, state n=410.

\*Scores represent mean responses measured on a scale from -2 (very poor condition) to +2 (very good condition). The higher the score, the better is the perceived condition of the variable. \*\*Overall scores are the mean of the mean scores.

**Table 16: Quality of Life—Tourism's Influence**

	Helena					Statewide				
	Negative Influence	Positive & Negative Influence	Positive Influence	No Influence	Mean Score*	Negative Influence	Positive & Negative Influence	Positive Influence	No Influence	Mean Score*
Museums and cultural centers	–	6%	89%	5%	<b>.93</b>	1%	9%	83%	7%	<b>.89</b>
Job opportunities	6%	20%	64%	10%	<b>.65</b>	6%	23%	60%	12%	<b>.61</b>
Education system	2%	15%	32%	52%	<b>.64</b>	2%	15%	31%	51%	<b>.58</b>
Parks and recreation areas	9%	31%	55%	6%	<b>.49</b>	10%	31%	49%	11%	<b>.43</b>
Overall community livability	10%	42%	34%	15%	<b>.28</b>	8%	51%	27%	15%	<b>.22</b>
Overall cleanliness and appearance	13%	44%	35%	9%	<b>.25</b>	13%	40%	36%	11%	<b>.25</b>
Infrastructure	15%	25%	24%	37%	<b>.14</b>	19%	29%	17%	35%	<b>-.04</b>
Emergency services	14%	36%	18%	32%	<b>.07</b>	12%	37%	24%	27%	<b>.17</b>
Cost of living	23%	38%	21%	19%	<b>-.02</b>	30%	30%	23%	17%	<b>-.08</b>
Conditions of roads and highways	34%	28%	29%	9%	<b>-.05</b>	28%	34%	28%	10%	<b>.01</b>
Safety from crime	24%	38%	16%	22%	<b>-.10</b>	24%	42%	14%	20%	<b>-.12</b>
Traffic congestion	62%	27%	7%	4%	<b>-.58</b>	62%	24%	7%	8%	<b>-.60</b>
<b>Overall Mean**</b>	<b>.23</b>					<b>.19</b>				

Percentages may not add to 100 due to rounding. Helena n=178, state n=410.

\*Scores represent responses measured on a scale from –1 (negative influence) to +1 (positive influence); "no influence" response not included in individual or overall scores. The higher the score, the more positive the perceived influence of increased tourism on the condition of the variable. \*\*Overall scores are the mean average of the mean scores.

Considering both the current condition and tourism's influence on quality of life, several interesting differences emerge. Helena residents feel the overall current condition of the listed quality of life variables is good, and their overall score is higher than for the statewide respondents. Indeed, seven of the 12 variables received a score higher than 1.00 indicating the particular variables were in very good condition, compared to four for the statewide group. However, when considering tourism's influence upon these variables, both groups' scores were similarly distributed which led to comparable overall mean scores. With these overall scores being positive, this suggests that both respondent group see benefits to their quality of life with increased tourism.

## **Perceived Connections between Tourism and Community Life**

### **Tourism Support**

In addition to tourism's perceived influence on quality of life, another method of measuring the degree of support for tourism development is to ask respondents questions specific to the tourism industry and about interactions with tourists. Respondents were asked to indicate their level of agreement or disagreement with a number of tourism-related statements. Responses ranged from –2 (strongly disagree) to +2 (strongly agree). As before, a positive score indicates agreement, while a negative score indicates disagreement (Table 17).

The perceived lack of connection between tourism development and personal benefit may be one of the main obstacles currently facing this type of development in the state, and also a reason for the modest score on the Index of Tourism Support by Montana residents. Overall, however, respondents support continued tourism promotion by the state even though they may not see a direct economic benefit from these efforts.

**Table 17: Index of Tourism Support**

	Helena					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
Tourism increases opportunities to meet people of different backgrounds and cultures.	—	8%	79%	13%	<b>.98</b>	1%	9%	76%	15%	<b>.94</b>
Tourism promotion by the state of Montana benefits my community economically.	2%	8%	76%	14%	<b>.91</b>	3%	11%	73%	13%	<b>.81</b>
I support continued tourism promotion and advertising to out-of-state visitors by the state of Montana.	4%	10%	71%	15%	<b>.83</b>	5%	10%	70%	15%	<b>.79</b>
My community is a good place to invest in tourism development.	8%	11%	64%	17%	<b>.71</b>	4%	20%	65%	10%	<b>.57</b>
Increased tourism would help my community grow in the right direction.	7%	21%	55%	17%	<b>.55</b>	5%	24%	61%	11%	<b>.48</b>
The overall benefits of tourism outweigh the negative impacts.	6%	18%	68%	8%	<b>.55</b>	4%	18%	68%	10%	<b>.62</b>
I believe jobs in the tourism industry offer opportunity for advancement.	6%	39%	51%	3%	<b>.07</b>	12%	36%	50%	2%	<b>-.04</b>
If tourism increases in Montana, the overall quality of life for Montana residents will improve.	7%	41%	50%	3%	<b>.01</b>	11%	46%	40%	3%	<b>-.24</b>
If tourism increases in my community, my income will increase or be more secure.	18%	50%	24%	8%	<b>-.64</b>	17%	54%	24%	6%	<b>-.53</b>
I will benefit financially if tourism increases in my community.	21%	52%	24%	3%	<b>-.65</b>	19%	54%	21%	6%	<b>-.58</b>
<b>Index of Tourism Support**</b>	<b>.33</b>					<b>.28</b>				

Percentages might not add up to 100% due to rounding. Helena n=178, state n=410.

\*Scores represent mean response measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

\*\*The Index of Tourism Support is the overall mean average of the mean scores for each statement.

On the whole, Helena respondents show slightly more overall support for tourism than statewide residents. Specifically, Helena residents shared much more agreement than the statewide group regarding tourism investment in the community and quality of life improving with more tourism. These more positive perceptions of tourism, and several others, could help facilitate local efforts in developing tourism-related activities.

## Tourism Concerns

In addition to asking respondents about their support for tourism, they were queried about some concerns that also affect their attitudes and opinions regarding tourism (Tables 18-20). Responses ranged from -2 (strongly disagree) to +2 (strongly agree). As before, a positive score indicates aggregate agreement, while a negative score implies disagreement (Table 18).

**Table 18: Index of Tourism Concern**

	Helena					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I believe most of the jobs in the tourism industry pay low wages.	1%	15%	62%	22%	<b>.90</b>	1%	14%	67%	19%	<b>.89</b>
Tourists do not pay their fair share for the services they use.	3%	37%	34%	27%	<b>.43</b>	3%	38%	38%	21%	<b>.34</b>
Vacationing in Montana influences too many people to move to the state.	8%	49%	31%	12%	<b>-.10</b>	4%	45%	38%	13%	<b>.10</b>
In recent years, Montana is becoming overcrowded because of more tourists.	9%	63%	20%	8%	<b>-.47</b>	8%	60%	23%	9%	<b>-.36</b>
My access to recreation opportunities is limited due to the presence of out-of-state visitors.	10%	64%	17%	9%	<b>-.49</b>	9%	61%	22%	8%	<b>-.42</b>
<b>Index of Tourism Concern**</b>	<b>-.05</b>					<b>.11</b>				

Percentages might not add up to 100% due to rounding. Helena n=178, state n=410.

\*Scores represent mean response measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

\*\*The Index of Tourism Concern is the mean of the mean scores for each statement.

**Table 19: Land Use Concern**

	Helena					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
I would support land use regulations to help manage types of future growth in my community.	6%	6%	55%	33%	<b>1.03</b>	4%	12%	64%	20%	<b>.83</b>
There is adequate undeveloped open space in my community.	15%	33%	48%	5%	<b>-.04</b>	10%	29%	54%	8%	<b>.23</b>
I am concerned with the potential disappearance of open space in my community.	6%	29%	43%	22%	<b>.48</b>	6%	33%	38%	23%	<b>.41</b>
<b>Index of Land Use Concern**</b>	<b>.49</b>					<b>.49</b>				

Percentages might not add up to 100% due to rounding. Helena n=178, state n=410.

\*Scores represent mean responses measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

\*\*The Index of Land Use Concern is the mean of the mean scores for each statement.



**Table 20: Tourism-related Decision-making**

	Helena					Statewide				
	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean Score*
It is important that residents of my community be involved in decisions about tourism.	1%	5%	58%	36%	<b>1.24</b>	1%	2%	61%	36%	<b>1.30</b>
Decisions about how much tourism there should be in my community are best left to the private sector.	32%	39%	20%	10%	<b>-.63</b>	16%	57%	22%	6%	<b>-.54</b>
<b>Overall Mean**</b>	<b>.31</b>					<b>.38</b>				

Percentages might not add up to 100% due to rounding. Helena n=178, state n=410.

\*Scores represent responses measured on a scale from -2 (strongly disagree) to +2 (strongly agree).

\*\*Overall scores are the mean of the mean scores.

Regarding concerns over tourism, Helena residents seem marginally less worried about increased tourism than statewide respondents. The Helena group was much less concerned about visitors eventually moving to Montana and tourist overcrowding than the statewide group. Conversely, Helena residents expressed more agreement in their support of land use regulations than statewide respondents; even though both scores were fairly strong and overall land use concern index scores were identical. Finally, both groups were similar in their concerns (somewhat concerned overall) over local tourism-related decision-making.

### **Advantages and Disadvantages of Tourism Development**

To further clarify the perceived benefits and costs of tourism development, respondents were asked what they thought would be the top advantages and disadvantages of increased tourism in their community. These were open-ended questions where respondents provided their thoughts in their own words. The responses were then assigned to general categories to facilitate comparison (Tables 21 and 22).

**Table 21: Advantages Associated with Increased Tourism**

	Helena	
	Number of Responses*	Percent of Respondents
Economic growth	97	74%
Job opportunities	12	9%
Increases tax base	7	5%
Exposure to diverse people	6	5%
None	6	5%
Clean industry, helps protect environment	5	4%
More investment in infrastructure	2	2%

\*Respondents could offer more than one suggestion (n=131).

**Table 22: Disadvantages Associated with Increased Tourism**

	Helena	
	Number of Responses*	Percent of Respondents
Traffic congestion	38	31%
Overcrowding	22	18%
Stress on infrastructure	22	18%
Tourists moving here	13	11%
Increased crime	7	6%
Increase in minimum wage jobs	7	6%
None	7	6%
Increased costs, prices	6	5%
Limits recreation access	4	3%
Increased trash, pollution	3	2%

\*Respondents could offer more than one suggestion (n=123).

Expectedly, the main advantages and disadvantages of increased tourism followed a similar pattern as in other recent resident attitude surveys around Montana<sup>5</sup>. Economic growth and job opportunities are the major benefits residents anticipate with increased tourism, while traffic congestion, overcrowding and stress on infrastructure are the main disadvantages.

<sup>5</sup> Recent resident attitude surveys took place in Wheatland County and the Rocky Boy Reservation in 2004; in 2003 they were conducted in Cascade County, the Crow Reservation, and Wibaux County. See [www.itrr.umt.edu](http://www.itrr.umt.edu) for the 2003 and upcoming 2004 reports.

## Questions Specific to Helena

The Helena CTAP committee was given the opportunity to include questions specific to the region on the resident attitude questionnaire. The responses to these questions and other community-specific items are reported below (Tables 23-41). Several of the questions were open-ended and the responses were grouped together into relevant themes. Single responses and non-applicable answers were not included for time considerations and presentation purposes.

**Table 23: Local Attractions for Visiting Guests**

Where in the Helena area do you take visiting guests for leisure or, where do you suggest they visit?	Number of Responses*	Percent of Respondents
Gates of the Mountains	79	51%
Tour train	48	31%
Capital complex	46	29%
Downtown	42	27%
Museums	40	26%
Historical society	35	22%
Canyon Ferry	31	20%
Nearby mountains	29	19%
Mt. Helena	26	17%
Local restaurants	20	13%
Mansion tour	19	12%
Cathedral	14	9%
Carousel	12	8%
Marysville	9	6%
Reeder's Alley	8	5%
Spring Meadow Lake	7	4%
Boat tour	5	3%
Carroll College	5	3%
Hiking	5	3%
Last Chance Gulch	5	3%
Lewis & Clark caverns	3	2%
Sports, Brewers	3	2%

\*Respondents could offer more than one suggestion (n=156).

**Table 24: Attractions with Greatest Potential for Visitors**

Attraction Category	Number of Responses*	Percent of Respondents
Outdoor recreation	143	85%
Sporting events	105	63%
Historical and heritage	102	61%
Arts and culture	91	54%
Museums and cultural centers	84	50%
Natural areas	81	48%
Conferences/meetings	66	39%
Special events	62	37%
Retail shopping	43	26%
Other	26	15%
None of these	4	2%

\*Respondents could offer more than one suggestion (n=168).

**Table 25: Outdoor Recreation Attractions**

<b>Suggested Outdoor Recreation Attractions</b>	<b>Number of Responses*</b>	<b>Percent of Respondents</b>
Fishing	64	41%
Hunting	49	32%
Hiking	44	28%
Winter sports	44	28%
Boating	37	24%
Lakes	20	13%
Camping	19	12%
Mountain biking	17	11%
Off-road vehicles	3	2%
Swimming	2	1%

\*Respondents could offer more than one suggestion (n=155).

**Table 26: Sporting Events Attractions**

<b>Suggested Sporting Event Attractions</b>	<b>Number of Responses*</b>	<b>Percent of Respondents</b>
Carroll College sports	24	22%
High school sports	20	19%
Tournaments	14	13%
Football	13	12%
Baseball	12	11%
Hockey	12	11%
Soccer	7	6%
Rodeo	6	6%
Basketball	5	5%
Skiing	2	2%

\*Respondents could offer more than one suggestion (n=108).

**Table 27: Historical and Heritage Attractions**

<b>Suggested Historical and Heritage Attractions</b>	<b>Number of Responses*</b>	<b>Percent of Respondents</b>
Historical society	19	19%
Lewis & Clark history	10	10%
Mining history	10	10%
Downtown Helena	9	9%
Last Chance Gulch	6	6%
Old homes and architecture	6	6%
Tour train	5	5%
Ghost towns	4	4%
Mansion district	4	4%
Walking mall	4	4%
Cathedral	2	2%

\*Respondents could offer more than one suggestion (n=101).

**Table 28: Arts and Culture Attractions**

<b>Suggested Arts and Culture Attractions</b>	<b>Number of Responses*</b>	<b>Percent of Respondents</b>
Holter museum	16	21%
Archie Bray	13	17%
Concerts	13	17%
Art shows	12	15%
Museums	10	13%
Music festivals	8	10%
Myrna Loy	7	9%
Theaters	7	9%
Grand Street theater	6	8%
Symphony	6	8%
Dance	4	5%
Ballet	3	4%

\*Respondents could offer more than one suggestion (n=78).

**Table 29: Museums and Cultural Centers Attractions**

<b>Suggested Museum &amp; Cultural Center Attractions</b>	<b>Number of Responses*</b>	<b>Percent of Respondents</b>
Historical society	31	41%
Holter museum	24	32%
State museum	9	12%
Capital	5	7%
Russell museum	4	5%
Archie Bray	3	4%
Local history	2	3%

\*Respondents could offer more than one suggestion (n=76).

**Table 30: Natural Areas Attractions**

<b>Suggested Natural Area Attractions</b>	<b>Number of Responses*</b>	<b>Percent of Respondents</b>
Gates of the Mountains	25	28%
Lakes	21	24%
Canyon Ferry	10	11%
Mt. Helena	10	11%
National forests	9	10%
Spring Meadow Lake	7	8%
Missouri River	5	6%
Continental Divide	4	4%
Elkhorns	3	3%
Campgrounds	2	2%

\*Respondents could offer more than one suggestion (n=89).

**Table 31: Conferences and Meetings Attractions**

<b>Suggested Conference and Meeting Attractions</b>	<b>Number of Responses*</b>	<b>Percent of Respondents</b>
Government related	19	33%
Conventions	5	9%
Association meetings	4	7%
Business related	4	7%
Education related	4	7%
Great Northern town center	4	7%
Professional meetings		

\*Respondents could offer more than one suggestion (n=57).

**Table 32: Special Events Attractions**

<b>Suggested Special Event Attractions</b>	<b>Number of Responses*</b>	<b>Percent of Respondents</b>
Music festivals	15	23%
Concerts	12	19%
Rodeo	11	17%
Alive at 5	9	14%
Governor's cup	7	11%
Fair	6	9%
Symphony	3	5%
Marathons	2	3%
Tournaments	2	3%

\*Respondents could offer more than one suggestion (n=64).

**Table 33: Retail Shopping Attractions**

<b>Suggested Retail Shopping Attractions</b>	<b>Number of Responses*</b>	<b>Percent of Respondents</b>
Costco	6	17%
Small local stores	5	14%
More chain stores	4	11%
Capital Hill mall	3	8%
Walking mall	3	8%
Made in Montana store	3	8%
New larger mall	3	8%
Great Northern	2	6%

\*Respondents could offer more than one suggestion (n=36).

**Table 34: Other Attractions**

<b>Suggested "Other" Attractions</b>	<b>Number of Responses*</b>	<b>Percent of Respondents</b>
Community events	6	22%
Alive at 5	4	15%
Local tours	4	15%
New movie theaters	3	11%
Clubs	2	7%
Dance	2	7%
Upscale restaurants	2	7%

\*Respondents could offer more than one suggestion (n=27).

**Table 35: Helena Businesses Interaction with Visitors**

	Yes	No
I believe Helena <u>businesses</u> should improve the way they serve visitors.	54%	46%
<hr/>		
<i>If yes, how?</i>	Number of Responses*	Percent of Respondents
Better customer service	23	31%
Better variety of products, services	10	13%
Open longer hours	9	12%
Better prices	6	8%
More discounts, incentives	6	8%
Better visibility	5	7%
Make businesses more attractive	4	5%
More advertising	3	4%
Businesses already doing well	2	3%
Better awareness of local attractions	2	3%

Percentages might not add up to 100% due to rounding. N=178.

\*Respondents could offer more than one suggestion (n=75).

**Table 36: Helena Resident Interaction with Visitors**

	Yes	No
I believe Helena <u>residents</u> should improve the way they interact with visitors.	36%	64%
<hr/>		
<i>If yes, how?</i>	Number of Responses*	Percent of Respondents
Be more helpful	15	28%
Be friendlier	13	25%
Already friendly, helpful	9	17%
Be more welcoming	5	9%
Treat same as residents	5	9%
Improvement always needed	4	8%
Be more courteous	2	4%

Percentages might not add up to 100% due to rounding. N=178.

\*Respondents could offer more than one suggestion (n=53).

**Table 37: Helena Visitor Information Services**

	Yes	No
<b>I believe quality visitor information services are available in Helena.</b>	69%	31%
<hr/>		
<i>If no, how could it be made available?</i>	Number of Responses*	Percent of Respondents
Better central location	20	41%
Billboards, signs	9	18%
Better visibility	5	10%
Internet advertising	5	10%
Not aware of visitor information services	5	10%
More advertising	4	8%
Open longer hours	4	8%
Need better parking facilities	2	4%

Percentages might not add up to 100% due to rounding. N=178.

\*Respondents could offer more than one suggestion (n=49).

**Table 38: Tourism in Helena**

	Yes	No
<b>I believe tourism is good for Helena.</b>	95%	5%
<hr/>		
<i>Why?</i>	Number of Responses*	Percent of Respondents
New money to economy	92	71%
Shows how good Helena is	10	8%
Meet new people, cultures	9	7%
Environmentally-friendly industry	8	6%
Small businesses benefit	7	5%
Increases word-of-mouth advertising	6	5%
New jobs	4	3%
Increases property values, urban sprawl	3	2%
Increases revenues for local government	2	2%
Increases traffic	2	2%
Stress on infrastructure	2	2%
Low paying jobs	2	2%

Percentages might not add up to 100% due to rounding. N=178.

\*Respondents could offer more than one suggestion (n=129).



**Table 39: Helena Activities Not to be Promoted**

<b>What types of tourism activities should <u>not</u> be promoted in Helena?</b>	<b>Number of Responses*</b>	<b>Percent of Respondents</b>
Gambling	30	40%
Adult entertainment	7	9%
Car racing, 4X4	7	9%
Motorcycle rallies	7	9%
Any, all	5	7%
None	5	7%
Anything that hurts city or environment	4	5%
Rock concerts	4	5%
Special interest group gatherings	4	5%
Pro wrestling	3	4%
Fishing	2	3%
Religious gatherings	2	3%
Snowmobiling	2	3%

\*Respondents could offer more than one suggestion (n=75).

**Table 40: Positive impressions of Helena**

<b>What is a positive impression visitors might have of Helena?</b>	<b>Number of Responses*</b>	<b>Percent of Respondents</b>
Friendly	46	32%
Historical	32	22%
Clean	30	21%
Beautiful	25	17%
Scenic	13	9%
Good recreational opportunities	12	8%
Vibrant, diverse	11	8%
Arts and culture	10	7%
Western, laid back	8	5%
Good food, restaurants	7	5%
Open space	6	4%
Good place to raise family, good schools	4	3%

\*Respondents could offer more than one suggestion (n=146).

**Table 41: Negative impressions of Helena**

<b>What is a negative impression visitors might have of Helena?</b>	<b>Number of Responses*</b>	<b>Percent of Respondents</b>
Traffic problems, bad drivers	39	32%
Not enough shopping, restaurants	19	15%
Dirty, un-kept	16	13%
Unsightly box stores, strip malls	8	7%
Limited hours for downtown businesses	6	5%
Unwelcoming, unfriendly locals	6	5%
Urban sprawl	6	5%
Too many casinos	4	3%
Too political	4	3%
Lack of welcoming entrances	3	2%
Winter weather	3	2%
High prices	2	2%
Not enough activities for youth	2	2%

\*Respondents could offer more than one suggestion (n=123).

These Helena-specific questions help to give insights into residents' perceptions of local tourism-related questions. Overall, it seems that residents feel that Helena offers a wide range of tourist attractions. Although respondents' most popular local attraction for visiting guests is Gates of the Mountains, the next five most popular attractions are all located in downtown Helena. Similarly, Helena residents rated outdoor attractions as having the greatest potential for visitors; however, local sporting and historical attractions followed closely behind. This suggests that although Helena's surrounding natural environment is a strong draw for visitors, local events and city attractions are also in place for tourists.

Only a slim majority of Helena residents felt that local businesses should improve the way they serve visitors, and this could likely be achieved through better customer service. On the other hand, local residents did not feel that Helena residents need to improve their interactions with visitors. Strong majorities of respondents agreed that quality visitor information centers are locally available and that tourism is generally good for the area. Lastly, residents thought that visitors would think that Helena residents are friendly, despite the traffic problems visitors may have encountered during their stay. Taken together, these main points imply that residents believe Helena has potential for increasing tourism through its natural and urban attractions, and its friendly people.

## Conclusion

As part of the Community Tourism Assessment Program, the Helena action committee is in a unique position to have a discussion with their community about local tourism development. In light of this, the resident attitude survey serves as a tool to assist the community in making informed decisions about tourism-related issues. The following points highlight the main findings from the survey and the nonresident study to help provide a context of tourism development potential in and around Helena.

Overall, residents of Helena express support for local tourism development. Respondents believe that tourism should have a role in the local economy at least equal to other industries, if not a dominant role. Similarly, respondents showed considerable agreement about the advantages of increased tourism (jobs and economic growth), as well as tourism's positive influence on quality of life. Residents also expressed very little concern over increased tourism. Taken together, these attitudes suggest that Helena residents not only look favorably toward tourism, but they would like it to play a larger role in the economy and community life.

Looking at nonresident overnight visitors who travel in Helena and throughout Lewis and Clark County, nearly 40 percent are on vacation, close to the statewide percentage. This may be encouraging news for local residents considering that vacationers spend the most compared to all the other travel group types<sup>6</sup>. Furthermore, there are slightly more business and other travelers through Lewis and Clark County than statewide travelers; again, these traveler groups spend more than the average of all travel groups. This suggests that Helena businesses and organizations might find it financially beneficial to ensure that they are reaching out to the needs and desires of these travelers. However, visitors to Lewis and Clark County were much more likely to be visiting friends and relatives. These visitors spend less than other visitors.

Considering non-economic traveler attributes, even though the highest rated primary attraction was visiting family and friends, the next two attractions (mountains, Glacier National Park) were primary for nearly two-thirds of Lewis and Clark County visitors. Additionally, there were several highly rated outdoor recreation activities for the visiting nonresident travelers, indicating that these travelers are drawn to natural features that Montana and Helena offer. In view of all of these nonresident traveler characteristics, there appears to be potential marketing and enterprise opportunities for local entrepreneurs and residents with an interest in travel-related business activities.

Both the resident attitude survey and the nonresident study have implications for tourism development in Helena. Because the overall attitudes toward tourism seem positive, development of tourism programs or projects would likely find strong community support. Not only does there seem to be tourism business potential, but the prospects of increased economic growth and job opportunities would likely be welcomed.

---

<sup>6</sup> Wilton 2004. 2003 Nonresident Expenditure Profiles. <http://www.itrr.umt.edu/nonres/ExpendProfile03.pdf>. Accessed 3/3/05.

Finally, Helena residents have many unique attractions to share with visitors to the area. From a vibrant downtown, to the rich local history, to the abundance of outdoor recreation activities within close proximity of the city, Helena has numerous tourism qualities. However, some residents expressed concern over the potential influences tourism could have on residents' quality of life, increased congestion (both traffic and crowding), and stress on Helena's infrastructure. This suggests that even though most residents are favorable towards tourism development, they should also be mindful of the impacts (both positive and negative) that increased tourism could have on the residents and the resources of Helena.

## **Appendix A: Helena Survey Instrument**

# **Resident Attitudes Toward Tourism in Helena**



**Fall 2004**

**Institute for Tourism and Recreation Research  
The University of Montana  
32 Campus Drive #1234  
Missoula, MT 59812-1234**

**Part 1. Please indicate your involvement in the tourism industry in Helena and the role you think it should have in the local economy.**

**1a How much contact do you have with tourists visiting Helena? Please ☒ only one.**

☐ Frequent contact      ☐ Somewhat frequent contact      ☐ Somewhat infrequent contact      ☐ Infrequent contact

**1b Which of the following statements best describes your behavior toward tourists in Helena? Please ☒ only one.**

☐ I enjoy meeting and interacting with tourists.      ☐ I am indifferent about meeting and interacting with tourists.      ☐ I do not enjoy meeting and interacting with tourists.

**1c Which of the following statements best describes your job? Please ☒ only one.**

☐ I currently do not have a job.      ☐ My place of work provides the majority of its products or services to tourists or tourism businesses.      ☐ My place of work provides at least part of its products or services to tourists or tourism businesses.      ☐ My place of work provides none of its products or services to tourists or tourism businesses.

**1d Compared to other industries, how important a role do you think tourism should have in Helena? Please ☒ only one.**

☐ No role      ☐ A minor role      ☐ A role equal to other industries      ☐ A dominant role

**1e What types of economic development would you like to see in Helena? Please rank options 1 through 8, with 1 being the most desired.**

Agriculture.....	<input type="text"/>	Services (health, education, etc.)..	<input type="text"/>
Manufacturing .....	<input type="text"/>	Technology.....	<input type="text"/>
Mining .....	<input type="text"/>	Tourism/Recreation.....	<input type="text"/>
Retail/Wholesale Trade.....	<input type="text"/>	Wood Products .....	<input type="text"/>

**1f In your opinion, how is the population changing in Helena? Please ☒ only one.**

☐ Population is not changing (please skip to PART 2)      ☐ Population is increasing      ☐ Population is decreasing

**1g If you feel the population of Helena is changing, how would you describe the change? Please ☒ only one.**

☐ Too fast      ☐ About right      ☐ Too slow

**PART 2. The following questions are specific to Helena. Please share your thoughts and opinions as they will be helpful in making informed decisions for the county.**

**2a What type of attractions in the Helena area have the greatest potential for attracting visitors and getting them to return? Please ☒ all that apply and specify in the adjoining box.**

- ☐ Outdoor recreation.....such as
- ☐ Sporting events.....such as
- ☐ Conferences/meetings.....such as
- ☐ Arts and culture.....such as
- ☐ Historical and heritage.....such as
- ☐ Museums and cultural centers...such as
- ☐ Natural areas.....such as
- ☐ Retail shopping.....such as
- ☐ Special events.....such as
- ☐ Other.....such as
- ☐ None of these


**2b I believe Helena businesses should improve the way they serve visitors.**

☐ Yes ☐ No

**If Yes, How?**

--

**2c I believe Helena residents should improve the way they interact with visitors.**

☐ Yes ☐ No

**If Yes, How?**

--

**2d I believe quality visitor information services are available in Helena.**

☐ Yes ☐ No

**If No, how could it be made available.**

--

2e I believe tourism is good for Helena.

☐

Yes

☐

No

Why?

2f Where in the Helena area do you take visiting guests for leisure or, where do you suggest they visit in the area?

2g What is a positive impression visitors might have of Helena?

2h What is a negative impression visitors might have of Helena?

2i What types of tourism activities should not be promoted in Helena?

Part 3. Questions concerning quality of life in your community.



3a

Please indicate your opinion of the current condition of each of the following quality of life elements in Helena. Please ☒ only one response for each item.

	Very Poor Condition	Poor Condition	Good Condition	Very Good Condition	Don't Know
Emergency services (police, fire, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Museums and cultural centers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost of living	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety from crime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Condition of roads and highways	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Infrastructure (water, sewer, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Traffic congestion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall community livability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parks and recreation areas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall cleanliness and appearance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3b
Please indicate how you think the following elements of quality of life would be influenced if tourism were to increase in Helena. Please ☒ only one response for each item.

	Negative Influence	Both Positive and Negative	Positive Influence	No Influence	Don't Know
Emergency services (police, fire, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Museums and cultural centers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Job opportunities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Education system	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost of living	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Safety from crime	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Condition of roads and highways	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Infrastructure (water, sewer, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Traffic congestion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall community livability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parks and recreation areas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Overall cleanliness and appearance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3c
Please indicate your level of agreement or disagreement with each of the following statements regarding tourism in Helena and in the state of Montana. Please ☒ only one response for each item.

	Strongly Disagree	Disagree	Agree	Strongly Agree
I'd rather live in Helena than anywhere else.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
If I had to move away from Helena, I would be very sorry to leave.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I think the future of Helena looks bright.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Helena is a good place for people to invest in new tourism development.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Increased tourism in Montana would help Helena grow in the right direction.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is important that residents of Helena be involved in decisions about tourism.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Decisions about how much tourism there should be in Helena are best left to the private sector rather than the public sector.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

(continue on the following page)

**3c continued:****Please ☒ only one response for each item.***Strongly  
Disagree**Disagree**Agree**Strongly  
Agree*

There is adequate undeveloped open space in Helena.

☐☐☐☐

I am concerned about the potential disappearance of open space in Helena.

☐☐☐☐

I would support land use regulations to help manage types of future growth in Helena.

☐☐☐☐

Tourism promotion by the state of Montana benefits Helena economically.

☐☐☐☐

If tourism increases in Helena, my income will increase or be more secure.

☐☐☐☐

I will benefit financially if tourism increases in Helena.

☐☐☐☐

I support continued tourism promotion and advertising to out-of-state visitors by the state of Montana.

☐☐☐☐

I believe jobs in the tourism industry offer opportunity for advancement.

☐☐☐☐

Vacationing in Montana influences too many people to move to the state.

☐☐☐☐

In recent years, Montana is becoming overcrowded because of more tourists.

☐☐☐☐

My access to recreation opportunities is limited due to the presence of out-of-state visitors.

☐☐☐☐

If tourism increases in Montana, the overall quality of life for Montana residents will improve.

☐☐☐☐

Tourism in Montana increases opportunities to meet people of different backgrounds and cultures.

☐☐☐☐

Tourists in Montana do not pay their fair share for the services they use.

☐☐☐☐

I believe most of the jobs in Montana's tourism industry pay low wages.

☐☐☐☐

The overall benefits of tourism in Montana outweigh the negative impacts.

☐☐☐☐**3d In your opinion, what is the primary advantage of increased tourism in Helena?****3e In your opinion, what is the primary disadvantage of increased tourism in Helena?**

**PART 4. Please tell us a little bit about yourself. Keep in mind that this survey is completely confidential.**

**4a** How many years have you lived in Helena?

**4b** How many years have you lived in Montana?

**4c** What is your age?

**4d** Were you born in Montana? *Please* ☒ *only one.* ☐ Yes ☐ No

**4e** What is your gender? *Please* ☒ *only one.* ☐ Male ☐ Female

**4f** What is your employment status? *Please* ☒ *only one.*

☐ Employed ☐ Home maker ☐ Retired ☐ Unemployed or Disabled

**4g** How many people currently living in your house are employed?

**4h** If one or more are employed, please use the list below to let us know the type of work held by members of your household. *Please* ☒ *all that apply.*

<input type="checkbox"/> Agriculture	<input type="checkbox"/> Finance, Insurance or Real Estate	<input type="checkbox"/> Restaurant/bar
<input type="checkbox"/> Armed services	<input type="checkbox"/> Forestry/forest products	<input type="checkbox"/> Retail/wholesale trade
<input type="checkbox"/> Clerical	<input type="checkbox"/> Health care	<input type="checkbox"/> Services
<input type="checkbox"/> Construction	<input type="checkbox"/> Manufacturing	<input type="checkbox"/> Transportation, Communication or Utilities
<input type="checkbox"/> Education	<input type="checkbox"/> Professional	<input type="checkbox"/> Travel Industry

Other:   
(Please Specify)

**4i** Please include any additional comments below. (Attach additional pages if needed.)

**Thank you for your participation!**

Please place your completed questionnaire in the postage-paid envelope and drop it in any mailbox.

## Appendix B: Respondent Comments

Respondents were provided with space at the end of the questionnaire to include their own thoughts and comments. This was an open-ended format with no guidelines as to the topic of the comments, and thus they deal with a wide variety of issues. The following 38 comments are presented in no particular order. Indecipherable words or phrases were replaced with "[?]."

1. A sales tax would benefit Montana. Tourists would leave money to help state taxes.
2. Because of my secluded environment I do not feel competent to answer all of these questions. I have not checked the ones I don't know or can't remember.
3. Before I was disabled, I worked for an insurance company in management.
4. Came to MT in 1976 on a three-year job and never left. Two of our adult children moved to Helena from CA after visiting here.
5. For over 25 yrs I was totally involved in the outdoor rec. industry in MT/USA/Canada/Mexico. Go for sales tax – dump regressive property tax –all will help tourism and MT.
6. Great place to educate children & prepare them for life.
7. Helena businesses need to partner to offer–ski, lodging & air or golf, lodging & air packages to incoming tourists.
8. Helena needs a large convention/entertainment center. Helena needs to develop something which will attract tourist for repeat visits.
9. Helena needs to be smart about how it grows, beginning with supporting what we have to offer already.
10. Home day care.
11. I'm a recent resident & sight-impaired. Please survey someone else.
12. I am a 4th generation Helenan and spent 31 years in tourist transportation around the world [?]....
13. I realize that Helena can not grow or develop w/out changing. I like what we have. That's why I'm here.
14. I think tourism is one of many functions that can improve the quality of life and help economic growth in Helena & MT.
15. I was on state motel assoc. for 20 yrs. in Wagon Wheel Motel–president in Great Falls.
16. I worked 20 yrs with the MT FWP at the time we determined that recreating in MT was close to a 68 million dollar [?]....
17. I would like to see Helena get back to the smoking ban.
18. Increased zoning in Helena would greatly increase the beauty and provide a better framework for growth.
19. Need more jobs, better pay. Need large manufacturing to employ a diverse workforce. More better paying jobs.
20. Need to encourage open space, protect vistas need to protect vistas, night skies create connectivity of open spaces.
21. Need to have a sales tax, which is one of the best ways to have tourists pay for their use of our services.
22. No sales tax!!!! ever!!
23. Of all the possible business "improvements" to MT in general–tourism is the best in that it benefits Montanans financially.
24. Thank you for including me in this survey.
25. The fairgrounds area needs to be finished. It is one of our biggest assets. We miss out on so many events that would bring [?]....
26. The Helena chamber of commerce has never understood that growth for the sake of growth is the ideology of a cancer cell.
27. This is a good idea. Thank you for asking!
28. To promote tourism requires investment by private & public sectors. It will pay off but not directly.
29. Too frequent and long periods of drought (fire, etc) are having a neg. affect on tourism. Nothing can be done about this.
30. Tourism in the hands of Montanans not outsiders or a "few wealthy" dictating how or what MT (Helena) should look like!
31. Tourism is a false industry, seasonal and promotes low wages.

32. Tourism seasonal & spotty—manufacturing & industrial—stable-year-round support to community—plus pay more taxes.
33. We definitely need to do something regarding the traffic situation & to encourage more interesting retail stores & restaurants to come to area.
34. We had a business in West Yellowstone for over 20 yrs. We approved of the sales tax that was enacted there and appreciate how it benefited town.
35. Wife filled it out... James R. Hollingsworth deceased in 1998.
36. We need permanent jobs. Not seasonal ones. We need to grow from w/in our state, not rely on someone else to help us poor [?]....
37. We need stronger land use laws to mitigate the influence of out-of-state money. The freedom to travel is basic constitutional right.
38. We need to tax all tourists & increase fishing fees & camping fees for out-of-state.